

**State Controller's Office
Personnel and Payroll Services Division**



**505 PAR Transaction Guide
for the
Departmental Human Resources
Office**

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Prepared for use by the:
Personnel and Payroll Operations
Bureau

ABOUT THIS GUIDE: This document provides the steps needed to process a change to an employee's retirement account code upon receipt of a retirement determination letter from CalPERS.

To begin: Click on the applicable CalPERS determination letter below and follow the steps provided.

CalPERS Determination Letters

- [First or Second Tier Election Form](#) (example of this letter)
- [Election of Optional Membership – Legislative Employee](#) (example of this letter)
- [Election to Remain Subject to Miscellaneous Retirement Benefit Formula](#) (example of this letter)
- [Retirement System Election \(ES372\)](#) (example of this letter)

First or Second Tier Election Form

If you received a First or Second Tier Election Form letter from CalPERS, please follow these steps:

- Step 1: Review the Required and Conditional Chart for Retirement System Information {Change}
 - PAM Section 3.126
- Step 2: Key a 505 PAR transaction ([PAR Sample Elected Tier Change](#)). Be sure to include the following PAR items:
 - **Effective Date (PAR Item 210):** Identifies the effective date of the transaction. (Note: This will be the beginning of the pay period. See FAQ for exceptions.)
 - **Employment History Remarks (PAR Item 215):** Enter ELECTED TIER CHANGE
 - **(Retirement) Account Code (PAR Item 505):** One or two character code used to denote employees' retirement attributes.
 - PAR Item 515, 520, 525, and 530 will auto populate based on the account code.
- Step 3: If the transaction is included as part of a Do Not Key PAR package, you must submit the PAR package to SCO for keying. (See PAM Section 10.2)
 - To submit to SCO, use ConnectHR and select the CS Audits - PAR Package dropdown menu item.
- Step 4: After keying the transaction, be sure to verify in EH that the transaction was keyed correctly. A day after the transaction was keyed, the Personnel Specialist has to check the transactions keyed if it was reported/updated successfully to my|calPERS.

See example of a PAR entry here [PAR Sample Elected Tier Change](#)

Election of Optional Membership – Legislative Employee

If you received an Election of Optional Membership – Legislative Employee letter from CalPERS, please follow these steps:

- Step 1: Review the Required and Conditional Chart for Retirement System Information {Change}
 - PAM Section 3.126
- Step 2: Key a 505 PAR transaction ([PAR Sample Opt Member](#)). Be sure to include the following PAR items:
 - **Effective Date (PAR Item 210):** Identifies the effective date of the transaction. (Note: This will be the beginning of the pay period. See FAQ for exceptions.)
 - **Employment History Remarks (PAR Item 215):** Enter OPT MEMBER

- **(Retirement) Account Code (PAR Item 505):** One or two character code used to denote employees' retirement attributes.
 - PAR Item 515, 520, 525, and 530 will auto populate based on the account code.
- Step 3: If the transaction is included as part of a Do Not Key PAR package, you must submit the PAR package to SCO for keying. (See PAM Section 10.2)
 - To submit to SCO, use ConnectHR and select the CS Audits - PAR Package dropdown menu item.
- Step 4: After keying the transaction, be sure to verify in EH that the transaction was keyed correctly. A day after the transaction was keyed, the Personnel Specialist has to check the transactions keyed if it was reported/updated successfully to my|calPERS.

See example of a PAR entry here [PAR Sample Opt Member](#)

Election to Remain Subject to Miscellaneous Retirement Benefit Formula

If you received an Election of Optional Membership – Legislative Employee letter from CalPERS, please follow these steps:

- Step 1: Review the Required and Conditional Chart for Retirement System Information {Change}
 - PAM Section 3.126
- Step 2: Key a 505 PAR transaction ([PAR Sample SAF to MISC](#)) Be sure to include the following PAR items:
 - **Effective Date (PAR Item 210):** Identifies the effective date of the transaction. (Note: This will be the beginning of the pay period, unless effective on the date of permanent separation. Also see the FAQ.)
 - **Employment History Remarks (PAR Item 215):** Enter SAF to MISC
 - **(Retirement) Account Code (PAR Item 505):** One or two character code used to denote employees' retirement attributes.
 - PAR Item 515, 520, 525, and 530 will auto populate based on the account code.
- Step 3: If the transaction is included as part of a Do Not Key PAR package, you must submit the PAR package to SCO for keying. (See PAM Section 10.2)
 - To submit to SCO, use ConnectHR and select the CS Audits - PAR Package dropdown menu item.
- Step 4: After keying the transaction, be sure to verify in EH that the transaction was keyed correctly. A day after the transaction was keyed, the Personnel Specialist has to check the transactions keyed if it was reported/updated successfully to my|calPERS.

See example of a PAR entry here [PAR Sample SAF to MISC](#)

Retirement System Election (ES372)

If you received a Retirement System Election letter from CalPERS, please follow these steps:

- Step 1: Review the Required and Conditional Chart for Retirement System Information {Change}
 - PAM Section 3.126
- Step 2: Key a 505 PAR transaction ([PAR Sample Retirement System Election](#)). Be sure to include the following PAR items:
 - **Effective Date (PAR Item 210):** Identifies the effective date of the transaction. (Note: This will be the beginning of the pay period, unless effective on the date of permanent separation. Also see the FAQ.)

- **Employment History Remarks (PAR Item 215):** Enter RET SYS ELECT
- **(Retirement) Account Code (PAR Item 505):** One or two character code used to denote employees' retirement attributes.
 - PAR Item 515, 520, 525, and 530 will auto populate based on the account code.
- Step 3: If the transaction is included as part of a Do Not Key PAR package, you must submit the PAR package to SCO for keying. (See PAM Section 10.2)
 - To submit to SCO, use ConnectHR and select the CS Audits - PAR Package dropdown menu item.
- Step 4: After keying the transaction, be sure to verify in EH that the transaction was keyed correctly. A day after the transaction was keyed, the Personnel Specialist has to check the transactions keyed if it was reported/updated successfully to my|calPERS.

See example of a PAR entry here [PAR Sample Retirement System Election](#)

The purpose of this publication is to provide general information about personnel and payroll topics and is meant solely as a reference source. This publication does not supersede current applicable laws or regulations and is not intended for purposes of providing legal advice. If there is a conflict between applicable law or regulation and the contents of this publication, the law or regulation shall prevail.